

***Tools To Revitalize  
California Communities:  
A Mixed-Use Housing  
Development Symposium***

**October 29, 2004**

**8:00 AM - 4:30 PM**

**Sheraton San Diego Hotel and Marina  
San Diego, CA**

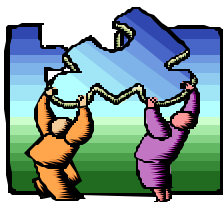
The Symposium will begin with a tour of a model housing and economic development project (Optional Event). Participants will visit a housing project at the Market Creek Plaza in San Diego, California. The mixed-use housing project was the site of an old factory that has been transformed for living, retail, and workspace – creating a “Smart-Growth” community. (Tour seating is limited.)

After the tour participants will return to the San Diego Sheraton Hotel and Marina for the welcome and introductions and a luncheon. The Symposium session on Affordable Housing and on Urban Real Estate and Mixed-Use Development will begin at 1:30 p.m. and conclude at 4:30 pm.

This program is designed specifically for community leaders, investors, bankers, small business owners, and interested parties who would like to learn about mixed-use development and affordable housing financing.

**Tools Symposium Cost: \$25.00**

**Additional Optional Tour Cost: \$10.00**



***For more program information call Robert W. Stroud,  
Seminar Coordinator, at (916) 653-6046 or email at  
Rstroud@treasurer.ca.gov.***

**AGENDA**

**8:00 a.m. Registration for Optional Tour**

**8:30 a.m. Optional Event: A Tour of a Model Housing and Economic Development Project**

Conference attendees will visit a mixed-use housing project at the Market Creek Plaza in San Diego. What may seem like a commercial development project is really a partnership between community residents and a private foundation to transform an old factory site into a mixed use development with living, retail, and work, creating a “smart growth” community. (*Seating is limited*)

***Jennifer Vanica***, Executive Director, Jacobs Family Foundation, Market Creek Plaza Partners

***Carol Fish***, Project Manager, Jacobs Family Foundation, Market Creek Plaza Partners

***Lisa Marie Harris***, Executive Director, California Debt and Investment Advisory Commission

**11:30 a.m. Tour Participants Return to Hotel**

**11:30 a.m. Check-in for All Program Attendees**

**12:00 p.m. Program Welcome and Introduction**

***Welcome:*** Lisa Marie Harris, CDIAC

***Remarks:*** Ron Roberts, San Diego County Supervisor

**LUNCHEON**

***Introduction***

***Dan V. McAllister***, San Diego County Treasurer

***Keynote Luncheon Presentation***

***Phil Angelides***, California State Treasurer

**1:30 p.m. Affordable Housing**

A panel of state and private housing specialists will share information on various housing and urban real estate development programs authorized to issue tax-exempt private activity bonds or mortgage credit certificates for multi-family rental housing and single-family housing. In addition, low-income housing tax credit programs are available to encourage private investment in rental housing for low- and lower-income families and individuals.

***Moderator:*** Laurie Weir, Executive Director, California Debt Limit Allocation Committee

***Jennifer Vanica***, Executive Director, Jacobs Family Foundation, Market Creek Plaza Partners

***Lynn Wehrli***, Executive Director, California Tax Credit Allocation Committee

***John Turner***, Section Chief, California Department of Housing and Community Development

**AGENDA (continued)**

**3:00 p.m. Urban Real Estate and Mixed-Use Development – Making It Work**

A panel of private practitioners will share information on urban real estate programs and development projects. This session will highlight new and creative ways that developers are integrating housing and public facilities, including libraries, schools, and community centers, into new communities. In addition, the panelists will discuss the CalPERS Urban Real Estate Initiatives Program.

***Moderator:*** Julie Rost, Investment Officer, CalPERS

***Richard Gentilucci***, Managing Director, Shamrock Capitol Advisors, Inc.

***John Given***, Senior Vice President of Development, CIM Group

***Laurence Pelosi***, Executive Director, Morgan Stanley

***Terezia Nemeth***, Director of Investments and Developments, BUILD Bridge Housing

**4:30 p.m. Program Conclusion**

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**ABOUT CDIAC**

The California Debt and Investment Advisory Commission (CDIAC) provides information, education and technical assistance on public debt issuance and investments to local public agencies and other public finance professionals. To carry out its responsibilities, CDIAC maintains a database of all public debt issued in California, conducts a continuing education program, publishes a monthly newsletter with debt issuance data and informative articles, and conducts research to develop reports, guidelines, and briefs on topical public finance issues.

**LODGING**

Hotel reservations should be made with the Sheraton San Diego Hotel and Marina, 1380 Harbor Island Drive, San Diego, CA 92101. The phone number is (619) 692-2200. A special room rate of \$110 is available to seminar participants. When making reservations, please indicate that you are attending the CDIAC Mechanics of a Bond Sale Seminar / Tools To Revitalize California Communities Symposium. **The deadline for the special hotel reservation rate is October 8, 2004.**

California Debt and Investment Advisory Commission  
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**REGISTRATION FORM**

*You will receive confirmation once the registration form and check is received.*

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Firm/Agency

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Telephone Facsimile

\_\_\_\_\_  
E-mail

☐ *I plan on attending the optional Market Creek Plaza tour  
and have included the additional \$10.00 cost.*

*Please send registration form and check to:*

**CDIAC/ Attention: Seminar Programs**

**915 Capitol Mall, Room 400**

**Sacramento, CA 95814**

**Phone: (916) 653-3269**

**Or fax your registration form to:**

**Fax: (916) 654-7440**

*No walk-in registrations will be accepted. Full refunds will be made to registered participants if CDIAC cancels or postpones the program. Substitution of officials or staff from the same entity is permitted. No refunds will be honored for cancelled registrations after the seminar registration deadline of October 8, 2004. Late registrations will be accepted after October 8, 2004, if space is available.*

**ECONOMIC DEVELOPMENT FORUM**

**An Invitation  
To Community Leaders  
Tools To Build Your Community...**

**California Debt and Investment  
Advisory Commission**

**Presents**

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CALIFORNIA COMMUNITIES:  
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